New Hampshire
visitnh.gov

2018-19 Fall & Winter Advertising Effectiveness

April 2019

insights
Strategic Marketing and Research

Background

- The New Hampshire Division of Travel and Tourism Development continues to place seasonal media campaigns targeting leisure travelers. Based on results of previous campaigns, the media, markets and creative are revised.
- In order to be accountable for the resources invested in these efforts, the Division has retained Strategic Marketing & Research Insights (SMARInsights) to measure the reach and impact of its marketing for the past four fiscal years. An entire year's worth of media was evaluated in a single measure for the first two research efforts, but starting in 2017-18 there were two waves of research based on seasonal placements. This is an evaluation of the 2018-19 fall and winter campaigns.
- The specific objectives of this seasonal awareness research:
  - Measure the reach of the fall and winter advertising among a targeted audience;
  - Evaluate the effectiveness of the Division's marketing through SMARInsights' destination marketing organization (DMO) cost-per-aware household benchmarking;
  - Understand the overlap and potential impact of multiple media;
  - Determine the ability of the creative to communicate desired messages, again using SMARInsights' benchmarking;
  - Assess the ability of the advertising to motivate interest in visiting and increase visitation;
  - Calculate the number of influenced trips, visitor spending, and return on investment of the media campaigns; and
  - Forward insights into future refinement of the marketing.

Methodology

- SMARInsights' advertising effectiveness methodology requires respondents to view the actual advertising in order to gauge awareness, so we developed and programmed an online survey. National sample vendors provided a survey link to potential respondents.
- In order to qualify for the survey, respondents had to be travel decision makers who regularly take overnight leisure trips of at least 50 miles from home. Respondents also had to be between the ages of 18 and 65.
- In order to evaluate individual target markets, quotas were established in Toronto, Montreal, Boston, and New York City. The Division's paid media placements have the ability to reach a broader audience throughout the Northeast. So in addition to the spot markets evaluated, interviews were completed in other markets in Connecticut, Maine, Massachusetts, Rhode Island, Vermont, New Jersey, and New York. The fall campaign also targeted the larger, more distant markets of Charlotte, Chicago, and Dallas.
- A total of 1,814 interviews were conducted across the target markets. Upon completion of data collection, the results were cleaned, coded, and weighted to be representative of the population.
- The following report summarizes the results of the survey. The questionnaire and the ads tested appear in the Appendix to this report.

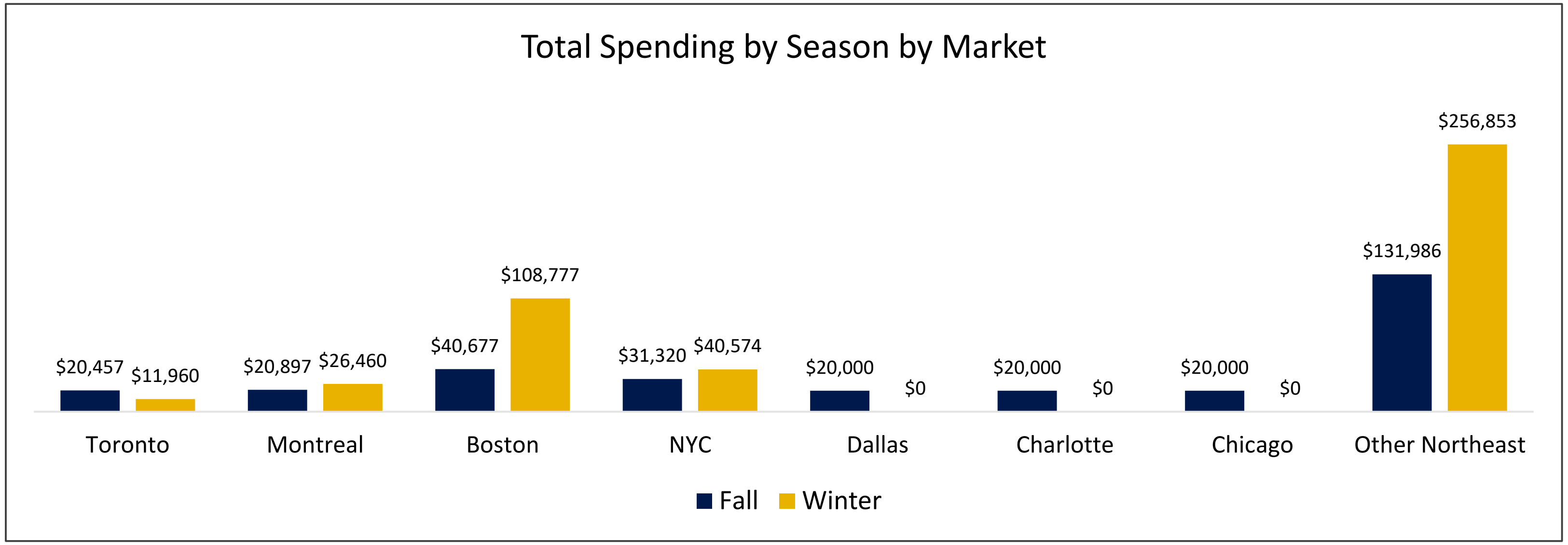
	Completed Interviews
Toronto	251
Montreal	253
Boston	301
New York City	304
Other Northeastern States	452
Fall Targets: Chicago, Dallas and Charlotte	253
Total	**1,814**

Campaign Overview

- Spending was slightly higher overall for both fall and winter from the previous fiscal year. The spending allocation was quite similar to the prior year.
- For the fall 2018 campaign, a limited amount of TV was introduced. The targeting of more distant markets continued.
- The creative placed was the same Limitless campaign under the Live Free brand.
- In terms of market spending allocation, about half of the media spend was in the other Northeast markets.

Spending by Season	2015-16	2016-17	2017-18	2018-19
Fall	$238,587	$274,099	$266,975	$305,338
Winter	$358,860	$444,493	$420,916	$444,625
Total	$597,447	$718,592	$687,891	$749,963

Spending by Media	2018-19 Fall	2018-19 Winter	Total
TV	$14,280	$96,420	$110,628
Print		$5,000	$5,000
OOH		$116,205	$116,205
Digital	$261,058	$140,000	$401,058
Social	$30,000	$87,000	$117,000
Total	$305,338	$444,625	$749,963



Insights

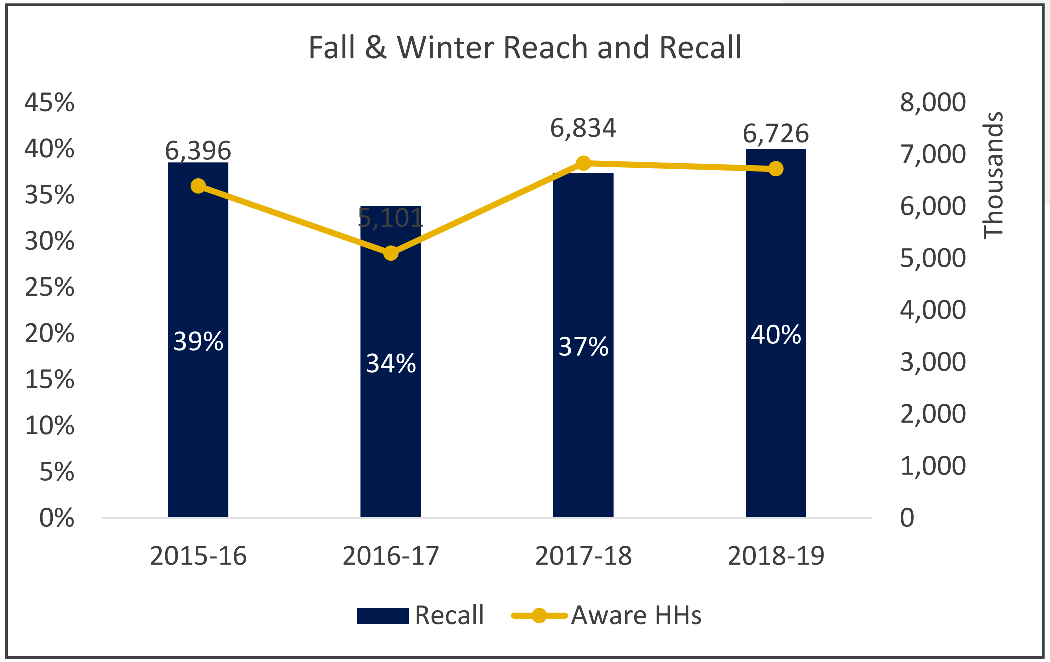
319,063	$242 million	$323
Influenced trips	Influenced visitor spending	Return on investment

- The Division's 2018-19 fall/winter advertising influenced about 319,000 trips to the state between September 2018 and April 2019. These ad-influenced trips resulted in $242 million in visitor spending and a return of $323 for each $1 invested.
- The Limitless campaign continues to wear-in as the Division continues to invest in this advertising. The Division increased media spending by 9% compared to the prior fall/winter campaign, and the result is higher ad awareness and greater advertising impact. Ultimately, the 2018-19 fall/winter advertising performed better than the 2017-18 fall/winter advertising, which generated 205,000 trips, $186 million in visitor spending, and a $270 ROI.
- The Division continues to implement efficient media plans, spending just $0.11 to reach a target household. The average cost per aware household for a state DMO spot market campaign is $0.51.
- The media plan results in overlap of fall/winter advertising awareness, which is critical for generating impact.
- The generational targeting is working, as advertising awareness is higher among Millennials and Gen-Xers than it is among Boomers.
- The fall and winter advertising generally receives average to above-average evaluative ratings. Getaway Car stands out for having less appeal than other executions. Reasons given for the negative reaction to Getaway Car included the type of activities being dangerous, tearing up the environment, too noisy, too frenetic and too focused on driving rather than the outdoors.
- Montreal is proving to be a difficult fall/winter market, generating no ad-influenced trips the past two years.
- While historically Boston has accounted for most of the influenced trips, the other Northeast states actually resulted in nearly half the trips this fall/winter – driven to a large extent by half of the media dollars being spent in this geography. New York City generated the second-most trips despite comparatively low awareness and incremental travel, but a very large population. Boston continues to be an important market. The success of the advertising in the "Fall Markets" (Chicago, Charlotte, Dallas) suggests viability of further market expansion.

Marketing Awareness

Overall Awareness

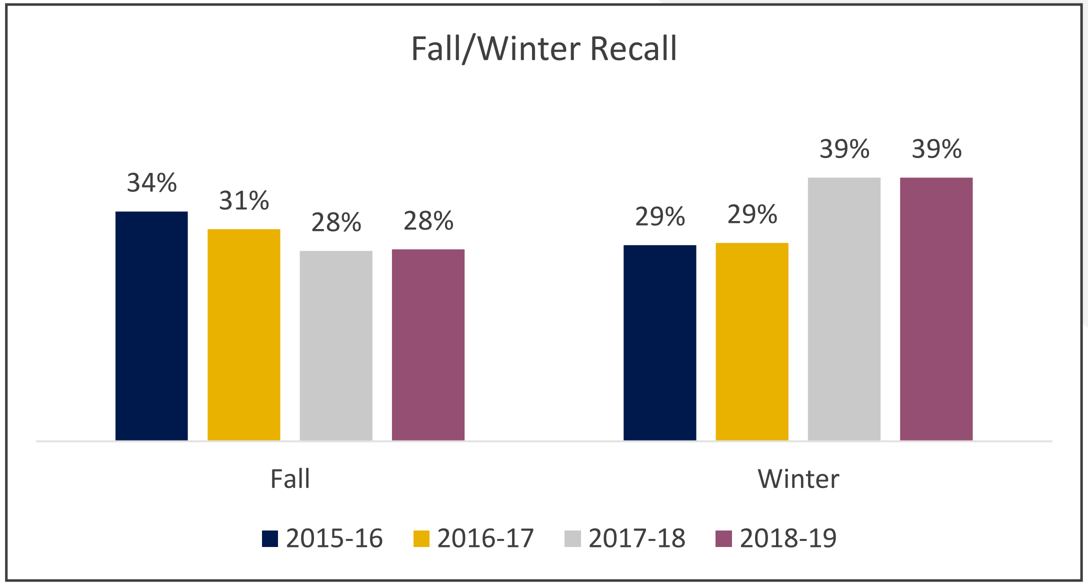
- With a similar media spend, placement and creative strategy, not surprisingly the results of this year's fall/winter effort are nearly identical to those of last year.
- With a slight increase in spend and with dropping the Tampa market in the fall, a slightly higher awareness resulted with more spending concentrated over fewer households. However, overall nearly the same number of households were reached.
- Nonetheless, these campaigns are both a comparatively minimal investment and enormously efficient, well exceeding a SMARInsights benchmarks for cost per aware household despite a marginal increase in this year's CPAHH.
- At such point that a shift in communication strategy or campaign is introduced, these excellent results can be expected to decline.



Fall/Winter Recall	**2015-16**	**2016-17**	**2017-18**	**2018-19**
Recall	39%	34%	37%	40%
Aware HHs	6,395,952	5,101,438	6,833,809	6,725,763
Media Spending	$597,447	$718,592	$687,891	$749,891
Cost per Aware HH	**$0.09**	**$0.14**	**$0.10**	**$0.11**

Overall Awareness

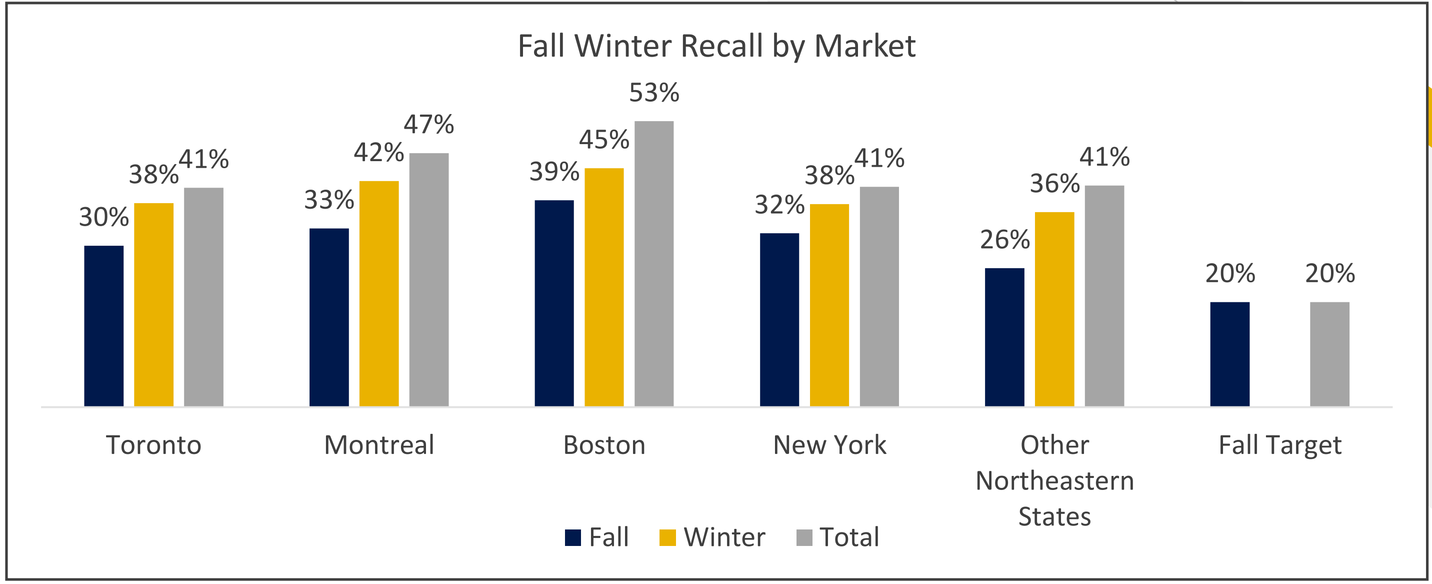
- When the awareness results of the fall/winter campaigns are discretely considered, the results again appear identical to last year's.
- Although the percentage of recall for the winter campaign is significantly higher than fall, the number of households reached is about the same for both campaigns. This is because far more households were targeted for the fall media.
- Specifically, the fall campaign includes some very large markets: Chicago, Dallas, and Charlotte. So although the percentage of recall for the fall media is sizably lower than the winter, each campaign reached a nearly identical number of households.

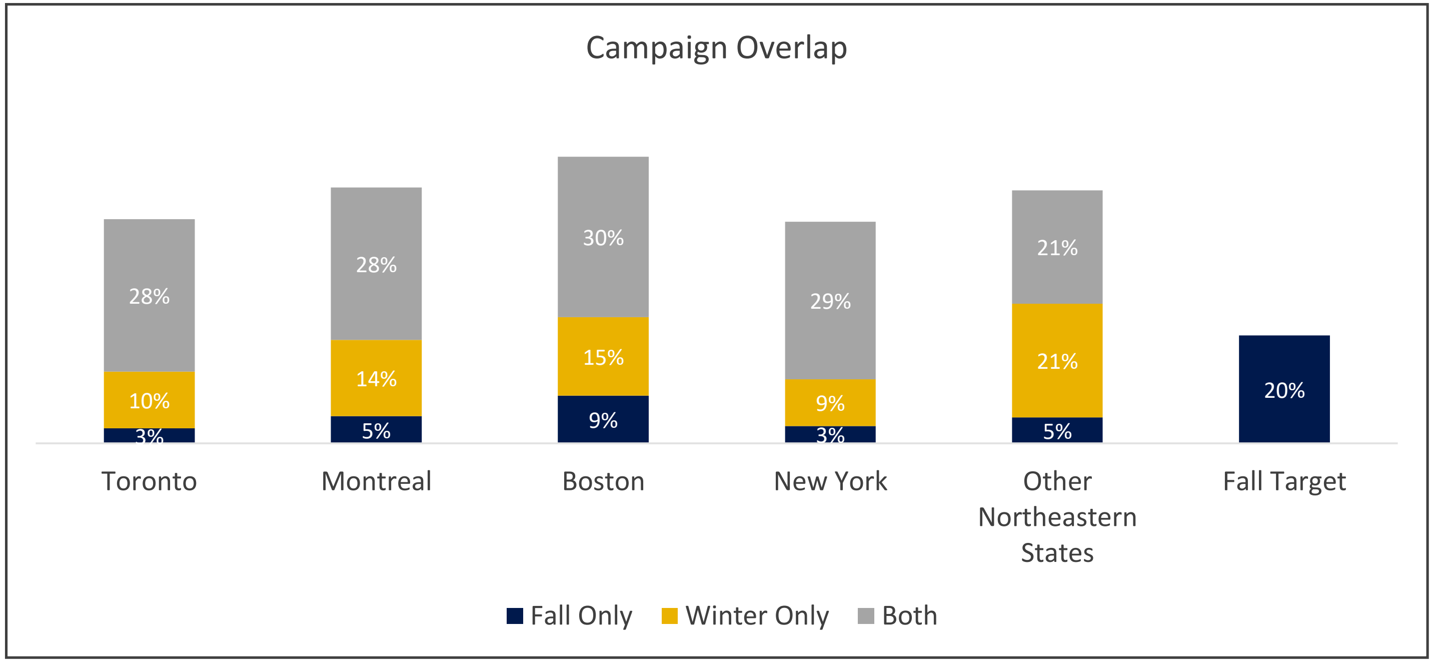


	Fall	Winter
Targeted HHs	18,270,009	13,596,329
Recall	28%	39%
Aware HHs	5,185,047	5,290,859
Media Spending	$305,338	$484,625
Cost per Aware Household	**$0.06**	**$0.09**

Overlap

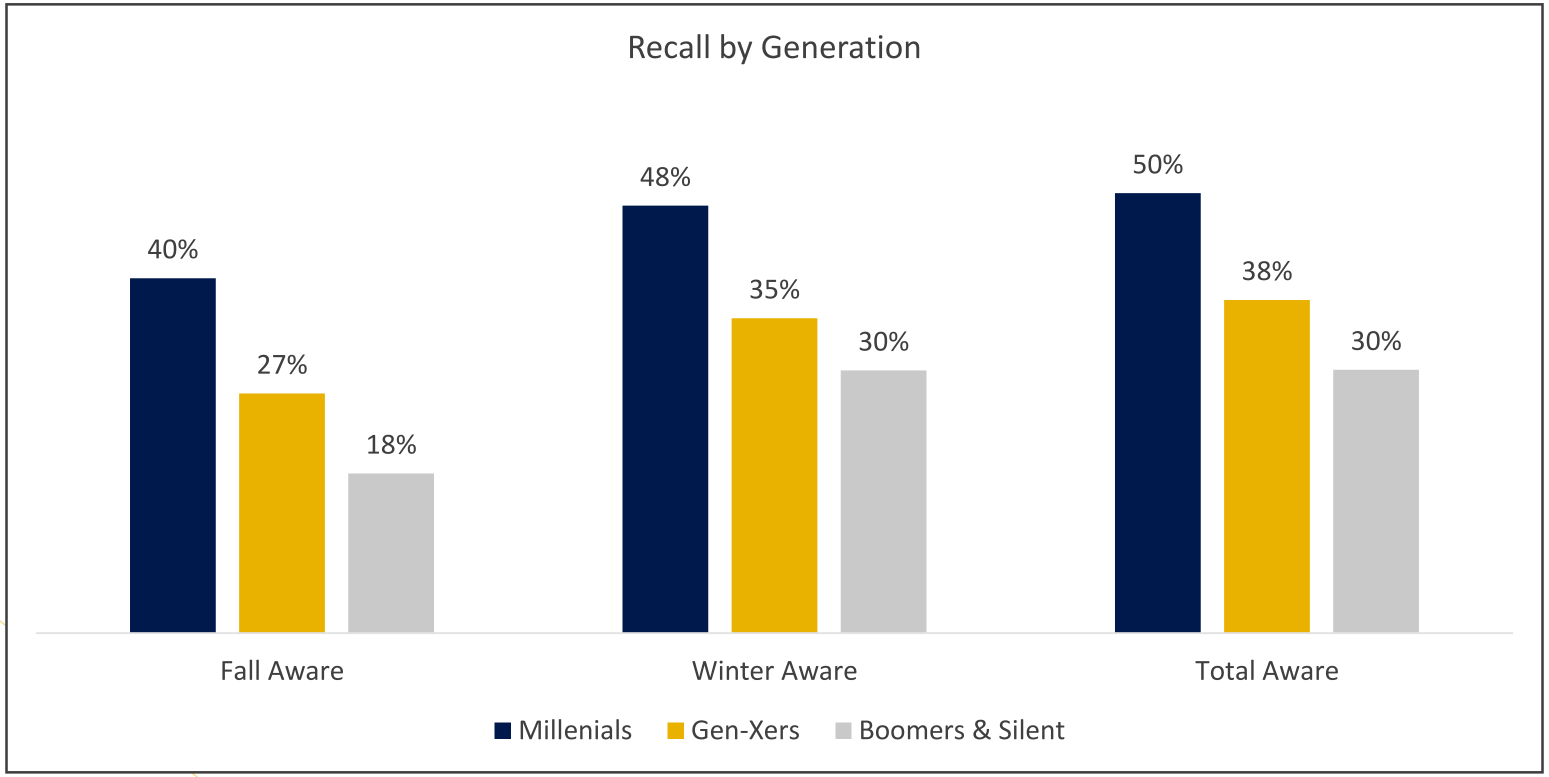
- Most of the markets targeted for fall and winter media received both campaigns and in fact are also targeted in the spring and summer efforts. This type of multiple exposures to multiple messages is consistently found to help generate higher levels of effectiveness.
- While this is only an evaluation of the fall and winter reach, the markets targeted for these two campaigns also receive spring and summer media, likely increasing the overlap of New Hampshire messaging even further.
- Additionally, the individual market awareness levels are roughly proportionate to the levels of spending in each of these geographies.





Recall by Generation

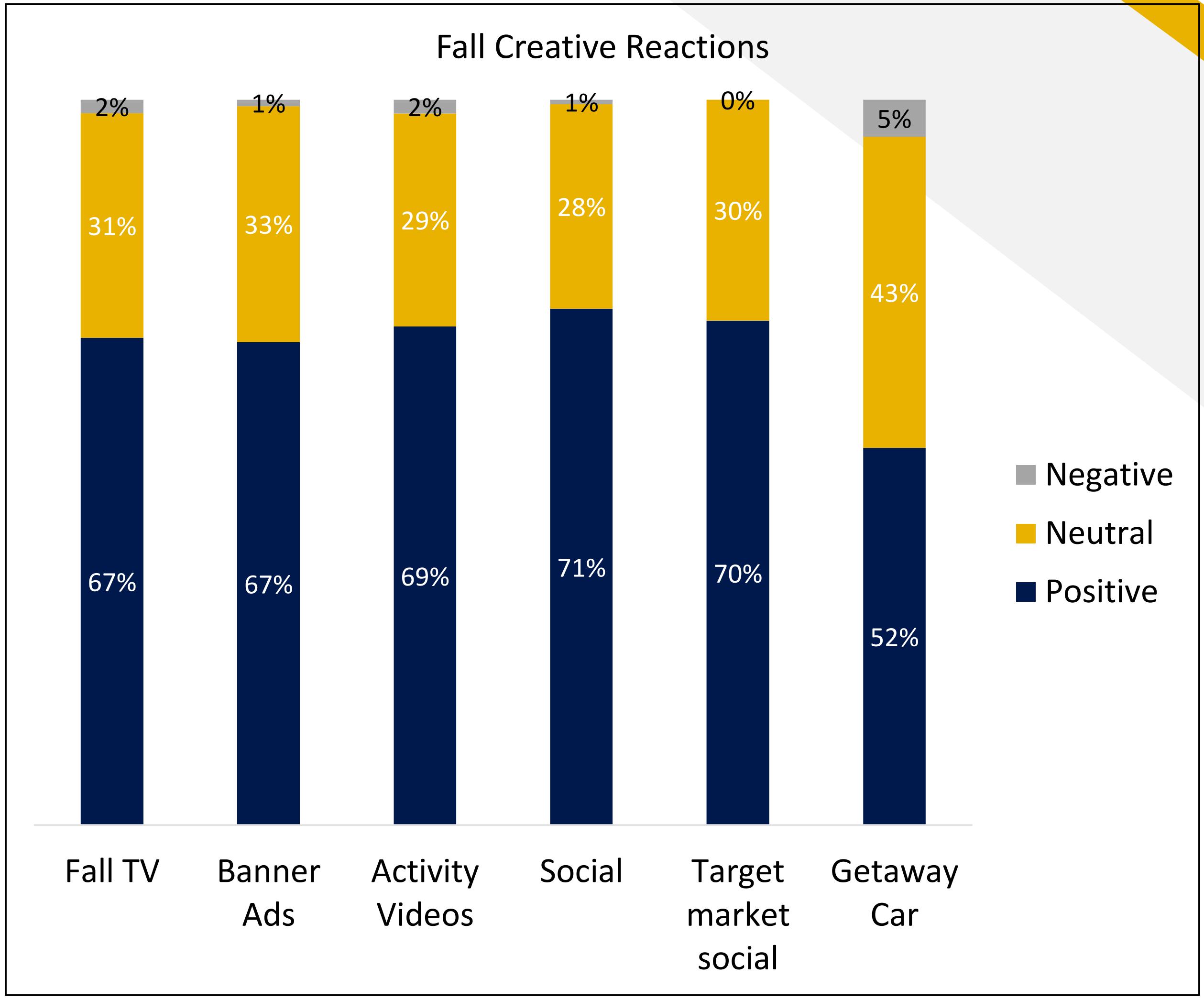
- Given that the campaign and the media buy is targeted to Millennials and Gen-Xers, it should be expected that the campaign's reach is sizably stronger among these younger audiences. This is a function of the messaging, the activities, the use of younger talent in the creative, and a media buy dominated by digital and social.



Creative Review

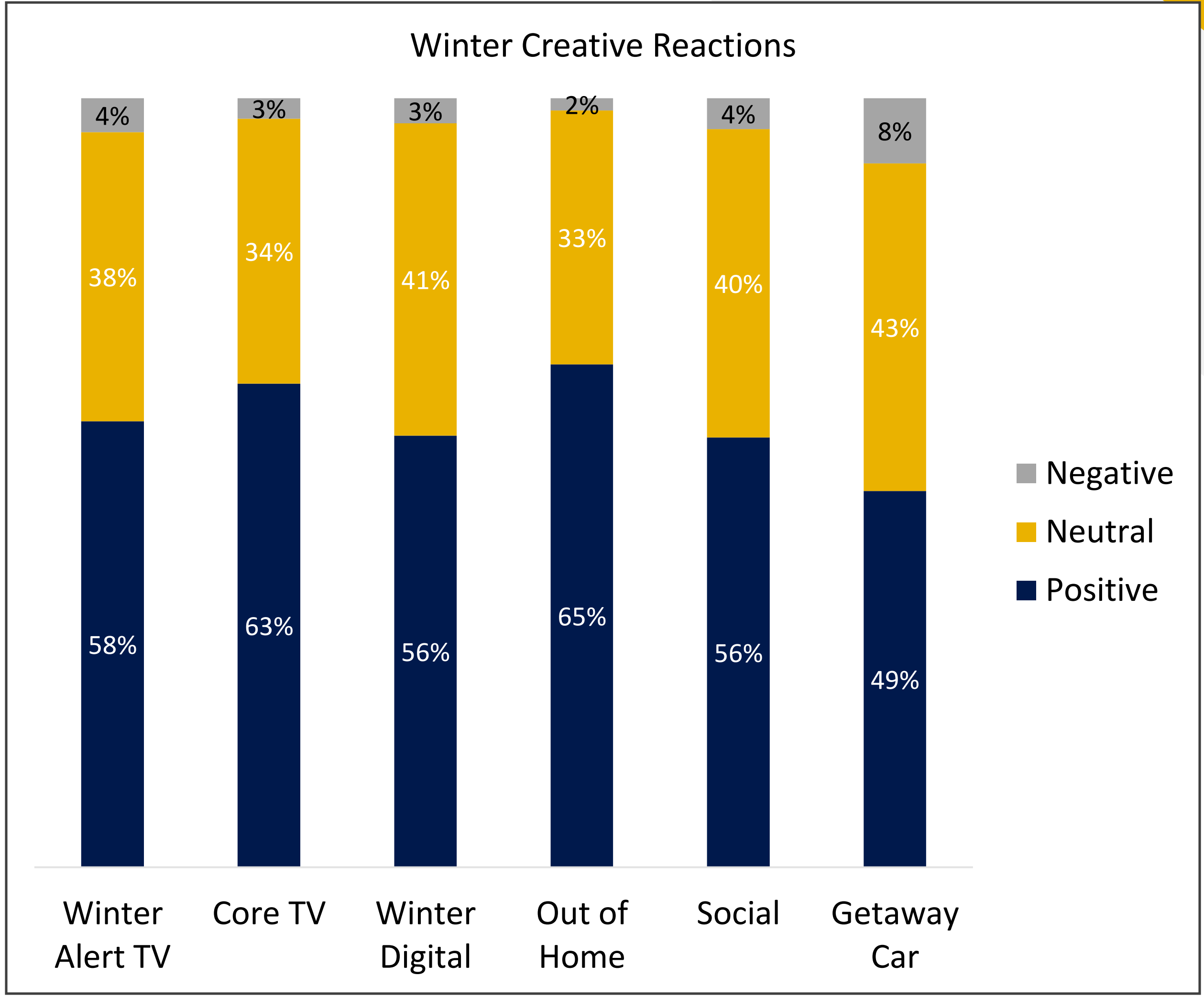
Fall Creative Reactions

- While the goal for destination marketing creative is to communicate messages designed to impact the image of and interest in the state or city, how consumers perceive the marketing can be relevant to recall. SMARInsights often sees marketing that generates a more positive reaction from consumers often also has a higher rate of recall.
- The fall creative reaction is extremely positive and is, in fact, slightly stronger than last year's assessment, which averaged 64% positive.
- The exception is the Getaway Car, which was received significantly less well. When asked why they were negative, the respondents' comments centered on the type of activity being dangerous, tearing up the environment, noisy, too frenetic and too focused on driving rather than the outdoors.



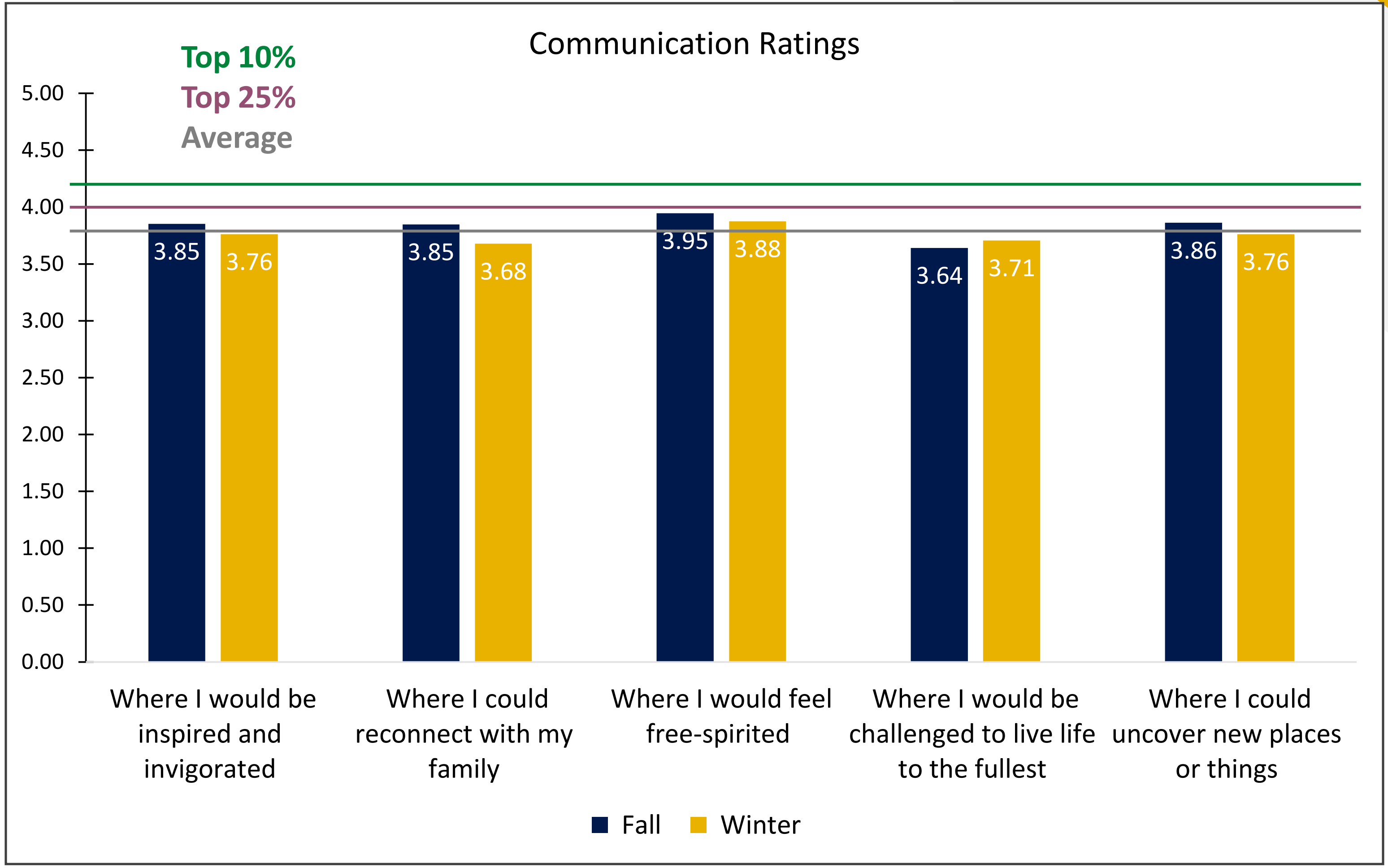
Winter Creative Reactions

- The winter campaign creative has generally scored less well due to less universality of appeal of winter outdoor sports. Skiing has a limited market. This is the key driver of the less positive reaction.
- While TV spots and videos typically score better, the stronger performance of the out-of-home assets is an interesting variant.
- And here again the Getaway Car is the least well-liked creative element. In this case, you add the dislike of cold and snow to the dislike of the activities and the dislike of the personas portrayed in the video.



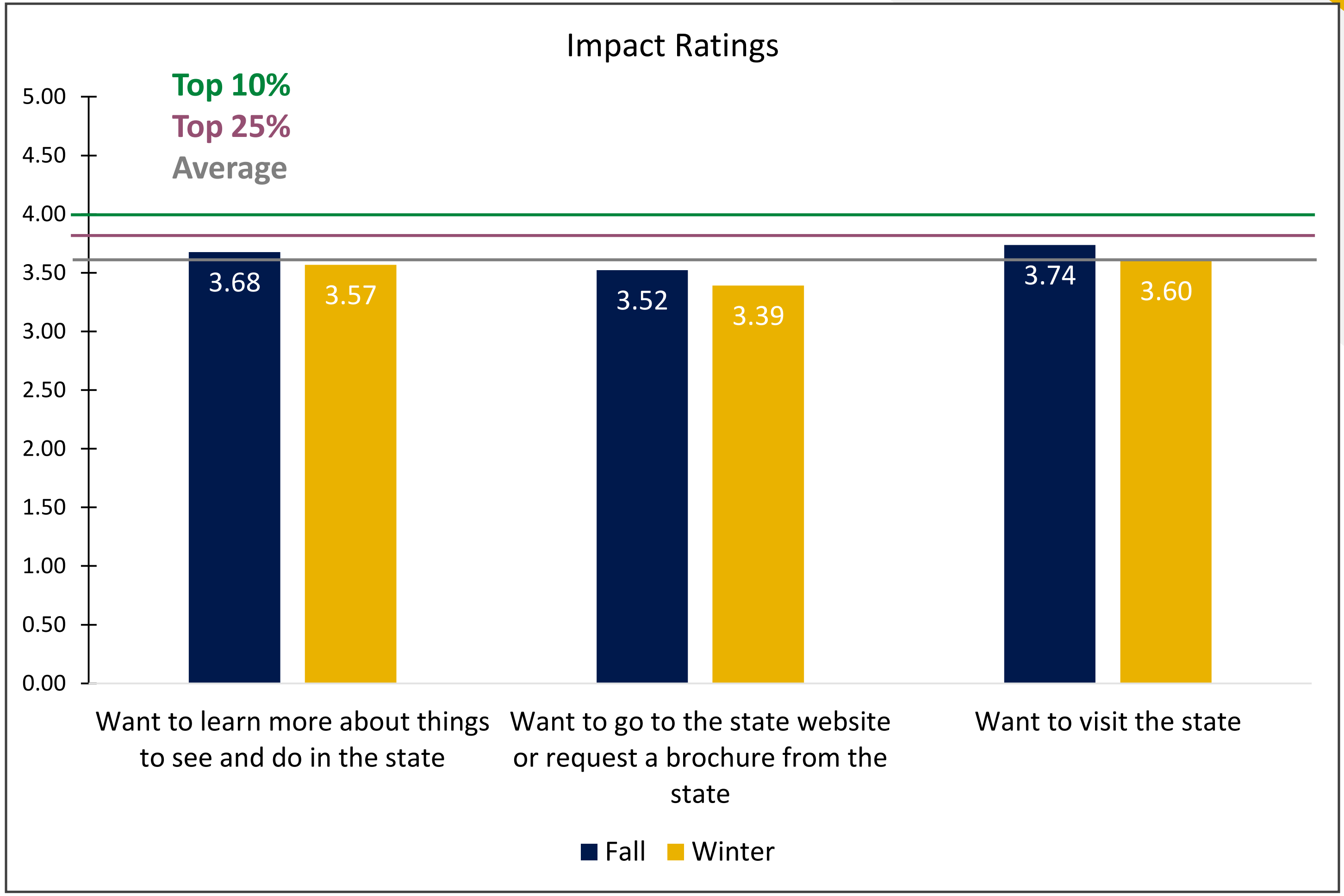
Communication Attributes

- When performance on the communication attributes is evaluated, fall generally performs better than the more segmented appeal of winter.
- The ads most effectively communicate *free-spiritedness*, *invigoration*, and *discovery,* scoring above-average compared to industry norms.
- Reconnection and being challenged are rated less well and actually score about average.



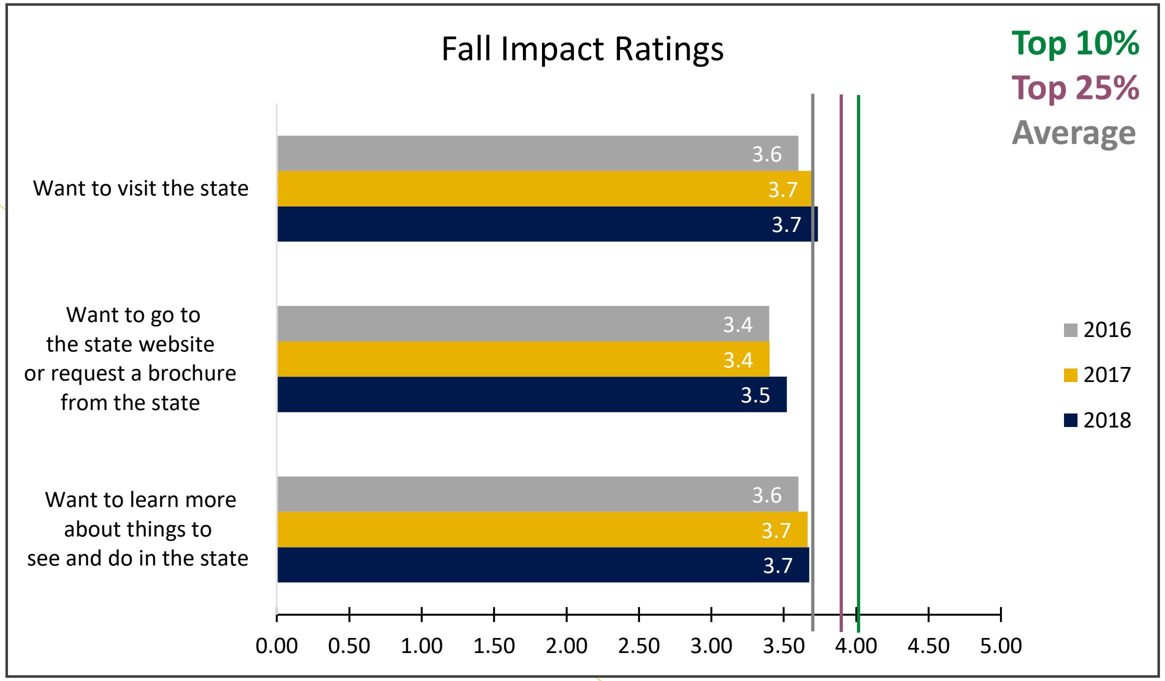
Impact Attributes

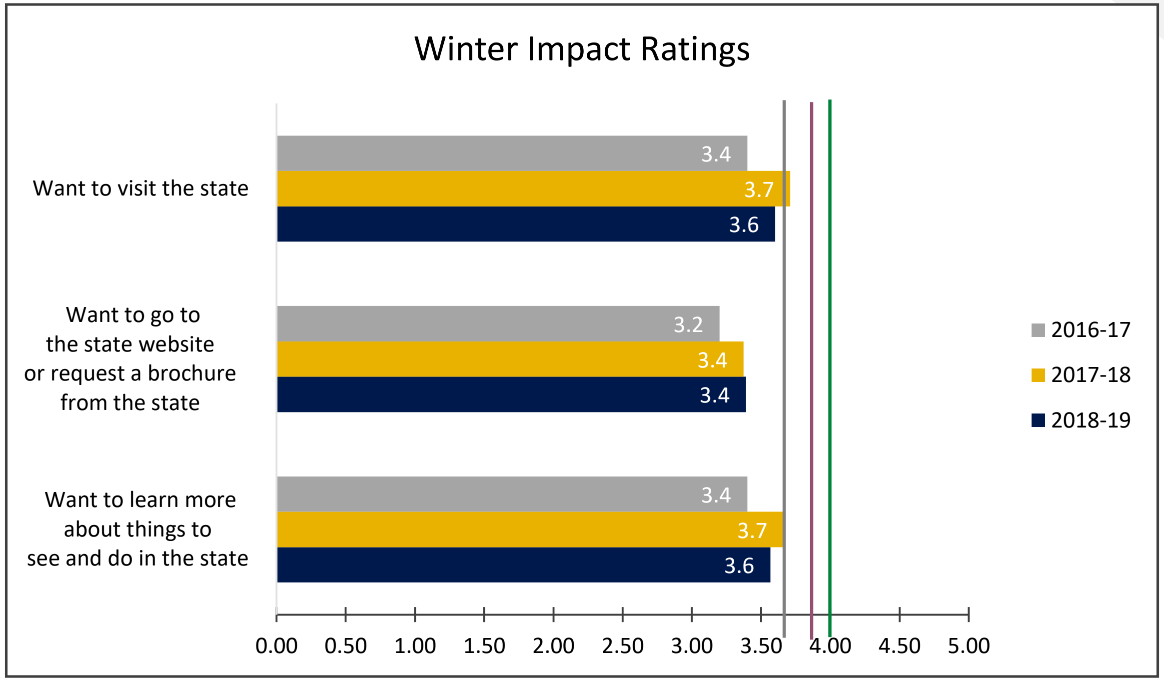
- Impact attributes, which relate to the ads influencing behavior, are more difficult to affect.   As a result, the norms here are lower with 3.9 representing the top 25% of ads tested and the average being 3.7.
- Given this lens, these ads can be judged as a whole to be average.
- No doubt part of this is a function of the narrowly targeted focus upon the active outdoors. While this has the positive of helping to position New Hampshire and allowing the state to own that image, much like winter, the active outdoors does not have universality of appeal.



Impact Ratings by Season

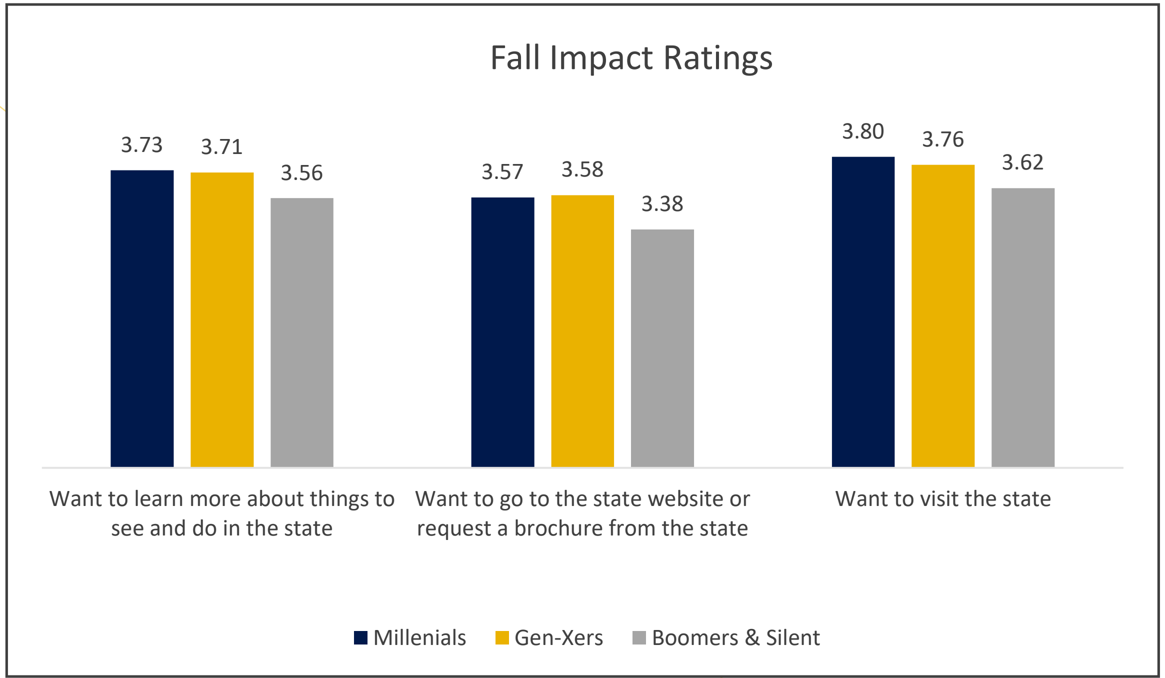
- Impact ratings for the fall each exhibited a small uptick. At the same time, the winter ads seemed to slip slightly in their impact. However, in both cases these impacts remain average.

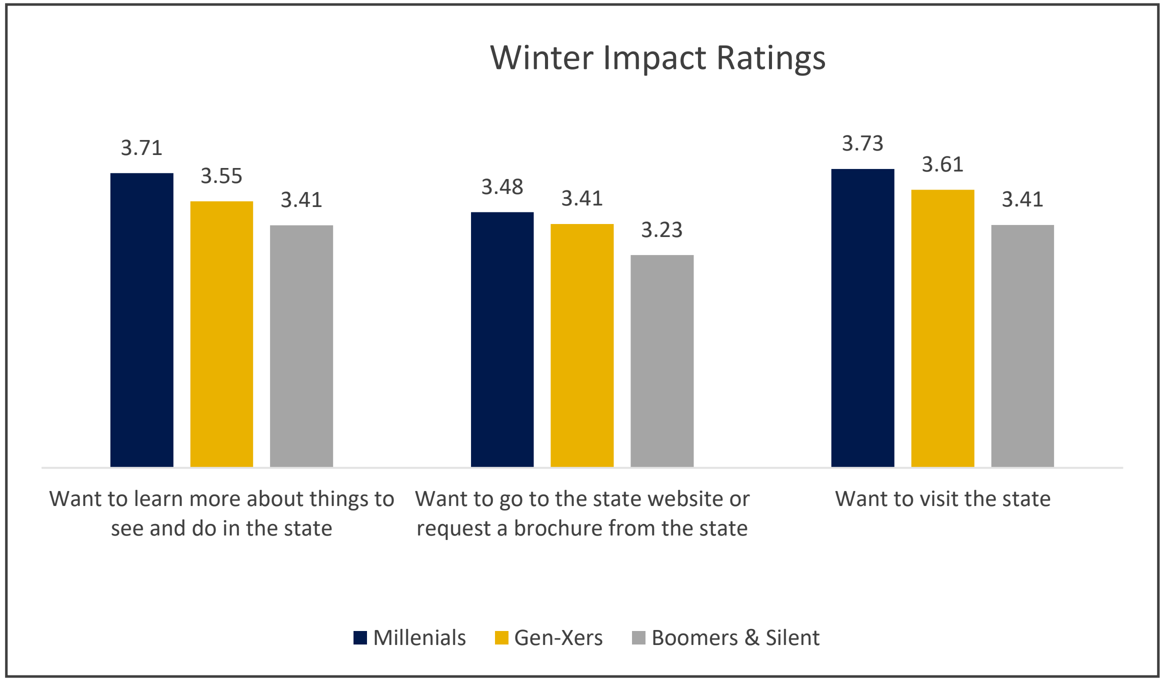




Impact Ratings by Generation

- However, the average impact performance is in part a function of messaging and target – the appeals are somewhat limited.
- When we consider the reaction by generation, the truth of this emerges. Clearly the younger, targeted demographic feels more resonance with these campaigns.
- Nonetheless, these scores still fall below the top 25% benchmark of 3.9 or higher.





Impact of the Advertising

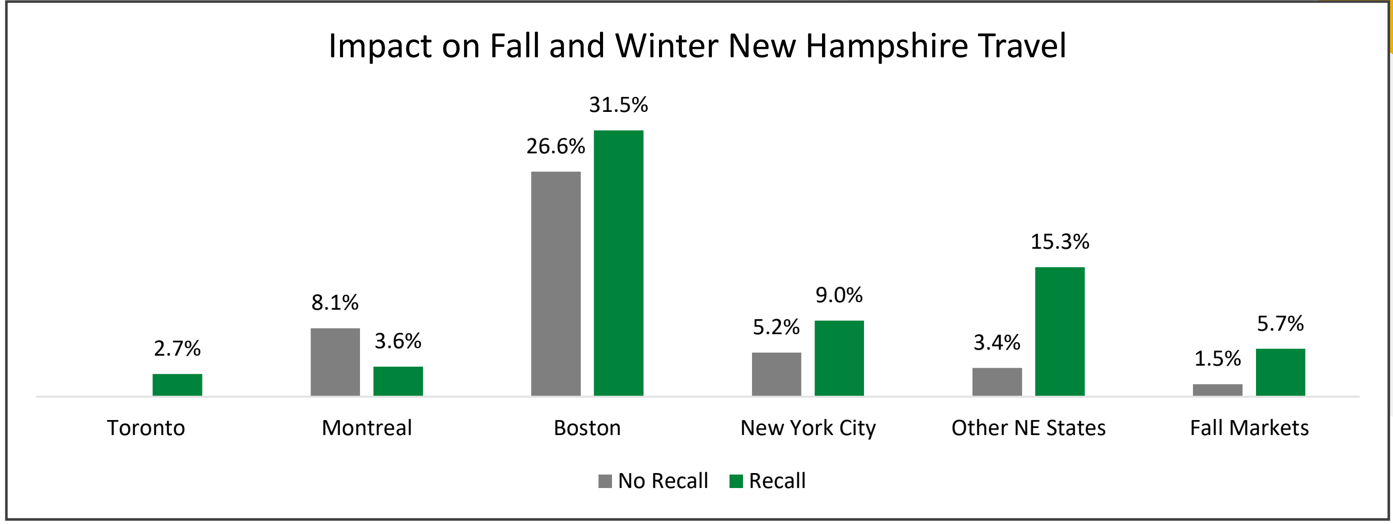
Incremental Travel

- While likelihood to visit is a good indicator of future performance of the campaign, it is the number of trips that the campaign is able to generate on which the effectiveness of the advertising is measured.
- SMARInsights' methodology for measuring the impact of destination advertising relies on establishing a base rate of travel. Certainly, there would be travel to New Hampshire even without any paid advertising. Thus not all visitation, or even visitation by aware households, is attributable to the ads. In this evaluation, the level of travel among *unaware* households is considered the base and what the state would see without the marketing campaign. Accordingly, any travel above that base by *aware* households is what is considered influenced. As such, this is a very conservative measure of influence.

Aware Travel − Unaware Travel = Incremental Travel

Impact of the Advertising on Travel

- Overall, the fall and winter media effort generated over 300,000 trips to New Hampshire between September 2018 and April 2019.
- While historically Boston has accounted for most of the influenced trips, the rest of the Northeast actually resulted in nearly half the trips – driven to a large extent by half of the media costs being spent in this geography. Boston is still the top source market, but the increment has declined.
- New York City generated the second most trips despite comparatively low awareness and increment but a very large population.
- Montreal generated no incremental trips, as was the case last year.
- The target long-haul market's success appears to suggest viability of further market expansion.



	Toronto	Montreal	Boston	New York	Other NE States	Fall Target	Total
Qualified HHs	1,904,188	1,205,877	1,556,829	4,780,556	2,991,308	4,443,174	16,881,936
Ad Aware	41%	47%	53%	41%	41%	20%	40%
Aware HHs	778,986	571,536	830,309	1,964,612	1,236,442	871,762	6,725,075
Increment	2.7%	0.0%	4.9%	3.8%	11.9%	4.2%	4.7%
Incremental Trips	21,054	-	40,506	73,947	147,127	36,430	319,063

Return on Investment

- The bulk of the growth in influenced trips resulted from the increased travel from other northeastern states. Since these nearby visitors represented about half of all influenced trips, this may have driven the average trip spending somewhat lower than last year.
- However, while the media spend this year represented a 9% increase over last year, the return on investment increased nearly 20% to $323.

	2017-18 Fall & Winter Influence	**2018-19 Fall & Winter Influence**
Influenced Fall & Winter Trips	204,568	319,063
Aware Trip Spending	$907	$758
Influenced Trip Spending	$185,578,461	$241,941,141
Media Spending	$687,891	$749,963
ROI	**$270**	**$323**

Tax Return on Investment

- Of the influenced visitor spending, only a portion is subject to tax. New Hampshire has no sales tax on goods and services, so not all visitor expenditures are subject to tax. Only those related to lodging, meals, and transportation are taxed.
- Based on the spending on the taxable categories of lodging, meals, and transportation, approximately $14 million is returned to the state in taxes from the influenced trips between September 2018 and April 2019. Given the investment in paid media for the fiscal year, this returns $19 to the state for every $1 invested. Not only is this higher than the previous years' tax ROI, it is also higher than the industry average ($12) for taxes returned. This is especially notable given New Hampshire's tax structure is much more conservative than other competitors.

	2017-18 Fall and Winter Influence	**2018-19 Fall and Winter Influence**
Influenced Trips	204,568	319,063
Taxable Spending	$562	$486
Total Influenced Taxable Spending	$114,980,198	$155,116,722
Taxes Generated	$10,348,218	$13,960,505
Media Spending	$687,891	$749,963
Tax ROI	**$14**	**$19**

Trip Specifics

Fall Trip Specifics

- Over the last several years, the characteristics of the fall visits have been reasonably stable – with 2+ people spending 2+ nights.
- The biggest shift seen this fall is that the visitor has lower income overall with fewer Boomers contributing to the decline in socio-economic status.

Trip Specifics	2015 Fall Trips	2016 Fall Trips	2017 Fall Trips	2018 Fall Trips
Nights in New Hampshire	2.6	2.9	2.3	2.6
People in your travel party	3.2	3.9	2.6	2.8
Kids on trip	30%	21%	27%	31%
Staying with friends and family	24%	23%	20%	19%
Average spending	$839	$720	$715	$794
Per person/per day spending	$103	$63	$118	$109
Income				
Less than $50,000	14%	29%	22%	32%
$50,000 but less than $75,000	38%	25%	23%	22%
$75,000 but less than $100,000	18%	16%	24%	16%
$100,000 but less than $150,000	18%	20%	19%	19%
$150,000 and up	12%	10%	12%	8%
Age				
Millennials (25-34)	32%	33%	28%	32%
Gen Xers (35-54)	27%	37%	37%	43%
Boomers (55+)	41%	29%	35%	25%

Winter Trip Specifics

- With the winter trips we see a sizable decline in the average spending. And while there is not the same shift in income seen in fall, there is an even stronger shift in age to a younger target. A young visitor engaging in a different mix of activities could be contributing to the drop in spending.

Trip Specifics	2015/ 2016	2016/2017	2016/2017	2018/2019
Nights in New Hampshire	2.8	3.2	2.7	2.7
People in your travel party	3.0	3.2	3.0	3.0
Kids on trip	45%	38%	33%	27%
Staying with friends and family	19%	22%	21%	20%
Average spending	$1,140	$1,000	$1,039	$939
Per person/per day spending	$138	$100	$131	$116
Income				
Less than $50,000	17%	22%	24%	20%
$50,000 but less than $75,000	19%	9%	20%	14%
$75,000 but less than $100,000	24%	16%	20%	24%
$100,000 but less than $150,000	28%	24%	17%	26%
$150,000 and up	12%	31%	19%	17%
Age				
Millennials (25-34)	49%	23%	34%	40%
Gen Xers (35-54)	30%	55%	42%	39%
Boomers (55+)	21%	22%	24%	22%

Trip Activities

- While there are seasonal differences in what consumers do on their New Hampshire trips, the primary activities they participate in and motivate them to visit are unchanged from season to season.
- The trip activities that generate some of the highest rates of participation and motivation include scenic drives, shopping, hiking, and culinary. Rarely does SMARInsights see shopping as a trip motivator, but given the lack of sales tax in New Hampshire, it can be a trip driver.
- Fall and winter visits do vary by the other activities that consumers participate in and motivate them to visit.

Demographics

- The media reach in terms of demography is nearly identical for the two seasons. Importantly, however, the visitors exhibit a greater skew. The media is reaching a younger, lower income, and less well educated demographic than is visiting. And this is especially true in winter where the ski visitors are significantly more upscale. This provides some targeting opportunities and may further suggest the opportunity for market expansion even in the winter.

	18-34	35-54	55+	Married	Kids in HH	High school or some college	College grad or higher	Under $50K	$50K-$100K	Over $100K
					Fall					
Aware HHs	47%	35%	18%	56%	41%	35%	65%	35%	29%	26%
Visitors	32%	43%	25%	60%	40%	32%	68%	32%	39%	29%
					Winter					
Aware HHs	46%	34%	20%	56%	44%	33%	67%	35%	35%	30%
Visitors	39%	39%	21%	53%	21%	26%	74%	20%	37%	43%

Appendix

Questionnaire

Questionnaire

New Hampshire Tourism
Ad Awareness and ROI
April 2019

ZIP. What is your postal/ZIP code? _______

S1. Please indicate which of the following describe you. Select all that apply.

ROTATE	Yes	No
I regularly use social media like Facebook, Twitter or Instagram	☐	☐
I normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home (IF =0, TERMINATE AFTER SCREENING QUESTIONS)	☐	☐
I regularly engage in some form of physical exercise like walking, biking or participating in sports to help stay healthy	☐	☐
I use video streaming services like Hulu or Netflix	☐	☐

S2. Who in your household is primarily responsible for making decisions concerning travel destinations?
1. Me
2. Me and my spouse/partner
3. My spouse/partner → TERMINATE
4. Someone else → TERMINATE

AGE. What is your age? __________ [TERMINATE under 18 - over 65]

Social. Which of the following social networking sites do you use? Select all that apply.
- Facebook
- Twitter
- YouTube
- Instagram
- Travel review sites such as TripAdvisor
- Snapchat
- Pinterest
- Other, please specify __________________
- None

2. How familiar are you with each of the following states, in terms of what it has to offer as a place for a leisure trip or vacation?

[ROTATE]	Not at all familiar	Not very familiar	Somewhat familiar	Very familiar
New Hampshire				
Connecticut				
New York				
Maine				
Massachusetts				
Rhode Island				
Vermont				

1

3. How likely are you to take a leisure trip to any of the following states in the next year?

[ROTATE]	Not at all likely	Not very likely	Somewhat likely	Very likely	Already planning a trip
New Hampshire					
Connecticut					
New York					
Maine					
Massachusetts					
Rhode Island					
Vermont					

4. Which of the following states would you prefer to visit for a leisure trip within the next year? **Please select only one.** [ROTATE]

New Hampshire	
Connecticut	
New York	
Maine	
Massachusetts	
Rhode Island	
Vermont	

5. Have you visited any of the following states since September 2018 for a leisure trip? How many trips did you take in each state since September 2018?

[ROTATE]	States visited since September 2018 (check all that apply)	Number of visits since September 2018
New Hampshire		
Connecticut		
New York		
Maine		
Massachusetts		
Rhode Island		
Vermont		
None of these		

6. In the course of planning for any recent or upcoming trips to New Hampshire, have you gathered information in any of the following ways?
   1. Requested a New Hampshire Visitor's Guide
   2. Visited the New Hampshire Tourism site, www.visitnh.gov
   3. Visited the Visit New Hampshire Facebook page
   4. Followed Visit New Hampshire on Twitter
   5. Followed Visit New Hampshire on Instagram
   6. Requested information about a New Hampshire trip in another way
   7. Received e-newsletter
   8. Read the New Hampshire Blog
   9. None of these

2

IF Q6_2=1, ASK Q7

I:\Ads Master\New Hampshire\Fall Winter 2018-19

Q7. Is this the New Hampshire website you visited?
1. Yes
0. No

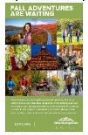
IF 6_3=1, ASK Q7A

I:\Ads Master\New Hampshire\Fall Winter 2018-19

Q7a. Is this the New Hampshire Facebook page you accessed?
1. Yes
0. No

[ASK ONLY FOR: 6 New England states (MA, NH, VT, ME, CT, RI) & New York**]**
IF q6=7, ASK Q7b

I:\Ads Master\New Hampshire\Fall Winter 2018-19\Fall 2018\Fall 2018\eNewsletter



Q7b. Is this similar to the New Hampshire e-newsletter you received?
1. Yes
0. No

3

Questionnaire

8. Please consider the following descriptions that could be used to describe travel destinations, and indicate how much you agree each statement describes New Hampshire.

HAVE THEM RATE NEW HAMPSHIRE IF AT LEAST SOMEWHAT FAMILIAR AT Q2

[ROTATE]	Strongly disagree	2	3	4	Strongly agree
Is a fun and exciting place					
Always has something new to discover					
Is a good place to live and work					
Is beautiful					
Offers an attractive lifestyle					
Is rich in culture and the arts					
Is a good place for culinary activities, including U-pick farms and beer/wine trails					
Has great parks					
Offers lots of outdoor recreation					
Is safe					
Is a kid-friendly vacation destination					
Is easy to get to					
Is unique because of the variety of destinations and activities it offers vacationers					
Has interesting historical sites and museums					
Is a great place for winter sports such as skiing and snowmobiling					
Is a place I would be excited to visit for a leisure trip					
Is a good place for shopping					
Is a great place to vacation when traveling with children					
Offers great vacations for people like me					
Is affordable					
Is a good place for fairs and festivals					
Is a good place to go to the beach					
Is a good place for water activities					

(IF Q5 IS NOT NEW HAMPSHIRE SKIP TO AD SECTION)
Now, please give us some information about the trip(s) you took to New Hampshire since September 2018.

9. When since September 2018 did you visit New Hampshire for a leisure trip? (ACCEPT MULTIPLES)
   - September 2018
   - October 2018
   - November 2018
   - December 2018
   - January 2019
   - February 2019
   - March 2019
   - April 2019

4

Now we'd like to ask you some questions about your most recent trip to New Hampshire.

10_1. How many nights did you spend in New Hampshire during this trip? ______

10_2. Including you, how many people were in your travel party? ________
ASK Q10b if Q10_2 >1

10b. Of those, how many were children under age 18? ________

10c. What forms of lodging did you use during your trip? Select all that apply.
- Luxury resort hotel
- High-end full-service hotel
- Mid-level hotel
- Budget hotel or motel
- Bed and breakfast/Inn
- Airbnb
- Camping/RVing
- Home of family or friends
- Vacation home
- Other

11. Which of the following activities did you participate in during your trip to New Hampshire? Select all that apply. [ROTATE]

Hiking or backpacking		Wildlife watching	
Visiting a state or national park		Bird watching	
Bicycling or mountain biking		Scenic drive	
ATVing		Sightseeing tour	
Rock climbing		Golfing	
Horseback riding		Shopping	
Hunting		Dining at locally owned restaurants	
Camping		Visiting a noteworthy bar or nightclub	
Snow skiing or snowboarding		Farm to table dinner	
Snowmobiling		Winery tours	
Fishing		Beer trail	
Visiting museums		Farmer's markets/U-picks/roadside stand	
Attend a play or concert		Canoeing or kayaking	
Attending a festival or fair		Boating	
Attending performing arts (music/theater)		Dogsledding	
Visiting historical sites		Cross country skiing	
Snowshoeing		Ice fishing	
Ice skating		Other, please specify__________	
		None of these	

ONLY SHOW THE ACTIVITIES THEY CHOSE ABOVE PLUS NONE AND ASK:

5

12. Of these activities, please indicate if there were any that were a major influence when you selected the **destination** for this trip to New Hampshire. You may choose up to 3.

INSERT NEW HAMPSHIRE REGIONS MAP

13. Which of the following regions did you visit during your trip?

14. Thinking about your overall travel experience in New Hampshire on your most recent trip, would you say it was…?
    - 5. Excellent
    - 4. Very good
    - 3. Good
    - 2. Fair
    - 1. Poor

15. When you think of your most recent trip to New Hampshire, what thoughts, feelings or emotions come to mind? ______________________________

16. To better understand your travel habits, we are interested in finding out the approximate amount of money you and other members of your travel party spent while in New Hampshire on your most recent trip. Please estimate how much your travel party spent in total on…
    Please complete all fields – best estimate is fine. If no expenditures in a category enter a "0"
    - Lodging/Accommodations ________
    - Meals/Food/Groceries ________
    - Entertainment/Attractions ________
    - Shopping ________
    - Entertainment such as shows, theater or concerts ________
    - Transportation to New Hampshire ________
    - Transportation within New Hampshire ________
    - Other ________

17. Thinking about this trip, how far in advance did you begin to plan?
    - 1…Less than 1 week
    - 2…1 to 2 weeks
    - 3…2 to 3 weeks
    - 4…3 to 4 weeks
    - 5…1 to 2 months
    - 6…3 to 4 months
    - 7…More than 4 months in advance
    - 8…Don't know

18. Did you post any information about this trip on the following outlets? Select all that apply.
    1. Facebook
    2. Twitter
    3. Flickr
    4. YouTube
    5. Blogs
    6. Instagram
    7. Pinterest
    8. None of these

6

Questionnaire

23. How likely are you to recommend a trip to New Hampshire?
    1. Very likely
    2. Somewhat likely
    3. Not likely

24. Have you seen any advertising for New Hampshire as a travel destination?
    1. Yes
    0. No

Next you will be shown some travel advertisements. Please take a moment to view the ads and answer the questions.

ROTATE SEASONS

Fall 2018 Ads

DIGITAL

 CANADA ONLY_shopping_300x250	 foliage_300x250	 hiking_300x250
	 pyo_300x250	 retarget_300x250

FallDigital. Please indicate if you have seen each of these online ads before.
Yes
No

FallDigitalB. What is your reaction to these ads?
1. Positive
2. Neutral
3. Negative – ASK FallDigitalC

FallDigitalC. Why do you feel that way? __________

TV

Vimeo # - 322085883

FallTV. How many times have you seen this or a similar ad for New Hampshire?
☐ More than three times
☐ Two or three times
☐ Once
☐ Never

FallTVA. Where do you recall seeing the ad? Select all that apply.
1. On TV
2. Online
3. Don't recall

FallTVB. What is your reaction to this ad?
1. Positive
2. Neutral
3. Negative – ASK FallTVC

FallTVC. Why do you feel that way? __________

DIGITAL ACTIVITY VIDEOS

DRED FALL 15 - APPLE PICKING V2.mp4
Vimeo # - 322086415

DRED FALL 15 - HAYRIDE V2.mp4
Vimeo # - 322086779

DRED FALL 15 - PUMPKIN V2.mp4
Vimeo # - 322087131

DRED FALL 15 - STORE V2.mp4
Vimeo # - 322087411

ASK FOR EACH VIDEO
FallActivity. How many times have you seen this or a similar ad for New Hampshire?
☐ More than three times
☐ Two or three times
☐ Once
☐ Never

ASK AFTER ALL VIDEOS SHOWN
FallActivityB. What is your reaction to these ads?
1. Positive
2. Neutral
3. Negative – ASK FallActivityC

FallActivityC. Why do you feel that way? __________

SOCIAL

FallSocial. Please indicate if you have seen each of these ads before.

FallSocialB. What is your reaction to these ads?
1. Positive
2. Neutral
3. Negative – ASK FallSocialC

FallSocialC. Why do you feel that way? __________

Questionnaire

SOCIAL: CHARLOTTE, CHICAGO AND DALLAS ONLY

FallSocial1. Please indicate if you have seen each of these ads before.

FallSocialB1. What is your reaction to these ads?
1. Positive
2. Neutral
3. Negative – ASK FallSocialC1

FallSocialC1 Why do you feel that way? __________

ASK OF EVERYONE:

Vimeo # - 326585761

FallSocial2. Have you seen this video before?
1. Yes
0. No

FallSocialB2. What is your reaction to this ad?
1. Positive
2. Neutral
3. Negative – ASK FallSocialC2

FallSocialC.2 Why do you feel that way? __________

<u>Winter 2019 Ads –</u> DO NOT SHOW ANY WINTER ADS IN FALL MARKETS: CHICAGO, CHARLOTTE AND DALLAS

ONLY BOSTON GETS THE "WINTER ALERT" AD

TV

Special Edition_Weather Alert_Limited Live Dates   Winter 30 Core TV Spot

Special Edition_Weather Alert_Limited Live Dates.mp4
Vimeo # - 322087762

Winter 30 Core TV Spot.mp4
Vimeo # - 322088242

ASK TV SERIES FOR EACH SPOT
WinterTV. How many times have you seen this or a similar ad for New Hampshire?
- ☐ More than three times
- ☐ Two or three times
- ☐ Once
- ☐ Never

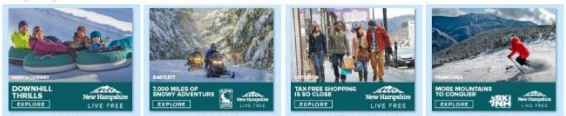
ASK FOR EACH AWARE
WinterTVA. Where do you recall seeing the ad? Select all that apply.
- On TV
- Online
- Don't recall

ASK FOR EACH VIDEO
WinterTVB. What is your reaction to this ad?
- Positive
- Neutral
- Negative – ASK WinterTVC

WinterTVC. Why do you feel that way? __________

Digital Ads

DOMESTIC: Ski_Core, Sled, Snowmobling
NYC only: Ski_Core, ,Sled, Snowmobling
Montreal: CANADA ONLY_Shopping, Ski_Core,
Toronto: CANADA ONLY_Shopping, Ski_Core,



sled_300x250   Snowmobile_300x250   CANADA ONLY_Shopping_300x250   ski_Core_300x250

Montreal only:
SHOW BOTH ON SAME SCREEN AND ASK AWARENESS

I:\Ads Master\New Hampshire\Fall Winter 2018-19\Winter 2019\Winter 2019\Digital Banners\Montreal_French Translated Test\Core Headline\CH300x600

Montreal only:
I:\Ads Master\New Hampshire\Fall Winter 2018-19\Winter 2019\Winter 2019\Digital Banners\Montreal_French Translated Test\Unique Headline\UH300x600

WinterDigital. Please indicate if you have seen either of these online ads before.

Questionnaire

WinterDigitalB. What is your reaction to these ads?
1. Positive
2. Neutral
3. Negative – ASK WinterDigitalC

WinterDigitalC. Why do you feel that way? __________

OUTDOOR

Billboards: BOSTON ONLY SEES ALL 4

HARTFORD ONLY SEES JUST THE 2 BELOW
NEW HAMPSHIRE GETS THE RED JACKET BILLBOARD AND THE BUS WRAP ON THE FOLLOWING PAGE.

Boston Posters: BOSTON ONLY

 Winter18_poster_Skiing	 Winter18_poster_tubing

Manchester Bus Rear:NEW HAMPSHIRE ONLY

Manchester NH Bus Rear

SHOW ALL ON ONE PAGE
WinterOutdoor. Have you seen these or similar ads before now?
- ☐ I have seen ads like these before now
- ☐ I have never seen ads like these

WinterOutdoorB. What is your reaction to these ads?
1. Positive
2. Neutral
3. Negative – ASK WinterOutdoorC

WinterOutdoorC. Why do you feel that way? __________

SOCIAL


Winter 2018_Top FB Ad


Winter 2018_Top FB Ad_2


Winter 2018_Top IG Story Ad

Winter 2018_Top IG Story Ad_2

WinterSocial. Please indicate if you have seen each of these ads before.

WinterSocialB. What is your reaction to these ads?
4. Positive
5. Neutral
6. Negative – ASK WinterSocialC

WinterSocialC. Why do you feel that way? __________

Questionnaire

Vimeo # - 326586322

WinterSocial2. Have you seen this video before?
1. Yes
0. No

WinterSocialB2. What is your reaction to this ad?
1. Positive
2. Neutral
3. Negative – ASK WinterSocialC2

Winter SocialC2. Why do you feel that way? __________

AFTER EACH SEASON IS SHOWN, ASK
28. Given all of these ads together, how much do you think this campaign shows a place...? ROTATE

	Strongly disagree				Strongly agree
Where I would be inspired and invigorated	1	2	3	4	5
Where I could reconnect with my family	1	2	3	4	5
Where I would feel free-spirited	1	2	3	4	5
Where I would be challenged to live life to the fullest	1	2	3	4	5
Where I could uncover new places or things	1	2	3	4	5

29. How much does this campaign make you...?. ROTATE

Want to learn more about things to see and do in the state	1	2	3	4	5
Want to go to the state website or request a brochure from the state	1	2	3	4	5
Want to visit the state	1	2	3	4	5

16

The following questions are for classification purposes only and will help us understand different groups of people.

The following questions are for classification purposes only so that your responses may be grouped with those of others.

D3. Are you currently ...?
Married
Divorced
Widowed
Single/Never married

D4. Including you, how many people live in your household? _______ [IF 1, SKIP TO D6]

D5. How many children under the age of 18 live in your household? ______

D6. Which of the following categories represents the last grade of school you completed?
High school or less
Some college/technical school
College graduate
Post-graduate degree

D7. Which of the following categories best represents your total annual household income before taxes?
USA:
Less than $35,000
$35,000 but less than $50,000
$50,000 but less than $75,000
$75,000 but less than $100,000
$100,000 but less than $150,000
$150,000 but less than $200,000
$200,000 or more

CANADA ONLY:
Less than $35,000 CAD
$35,000 but less than $50,000 CAD
$50,000 but less than $75,000 CAD
$75,000 but less than $100,000 CAD
$100,000 but less than $150,000 CAD
$150,000 but less than $200,000 CAD
$200,000 or more CAD

17

D2. Which of the following best describes your racial and ethnic heritage? Are you...?
Select all that apply.
African-American/black
Asian/Pacific Islander
Caucasian/white
Latino/Hispanic
Mixed ethnicity
American Indian
Other, please specify ____________)

D1. Are you ...?
Male
Female

18